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**TO: Economic Support Supervisors  
Economic Support Lead Workers  
Training Staff  
Child Care Coordinators  
W-2 Agencies  
Workforce Development Boards  
Job Center Leads and Managers**

**FROM: Amy Mendel-Clemens  
Technical Assistance, Training and  
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Bureau of Eligibility Management  
Division of Health Care Financing**

**BEM/DWS OPERATIONS MEMO**

**No: 05-19**

**DATE: 6/17/2005**

FS	<input type="checkbox"/>	MA	<input type="checkbox"/>	SC	<input type="checkbox"/>
CTS	<input type="checkbox"/>	CC	<input type="checkbox"/>	W-2	<input checked="" type="checkbox"/>
FSET	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input checked="" type="checkbox"/>
JAL	<input type="checkbox"/>	JC	<input type="checkbox"/>	RAP	<input type="checkbox"/>
WIA	<input type="checkbox"/>	Other EP	<input type="checkbox"/>	★	

**PRIORITY: HIGH**

**SUBJECT: NEW CARES FUNCTIONALITY FOR WORK PROGRAM OFFICE  
TRANSFERS**

**CROSS REFERENCE:** CARES Manual, Section 2, Chapter 9, Exit from Work Programs

**EFFECTIVE DATE:** June 17, 2005

**PURPOSE**

The purpose of this memo is to provide information about new CARES Work Programs (WP) office transfer functionality. The new functionality allows easier WP office transfers, which will more accurately reflect participant services provided by each Wisconsin Works (W-2) agency and decrease the Financial and Employment Planner Staff (FEP) workload by simplifying CARES procedures.

## BACKGROUND

Under the existing CARES WP office transfer functionality, when a W-2 agency wants to transfer a case between its W-2 program office and its Food Share Employment and Training (FSET) or Children First (CF) program office, the FEP has to end all activities/components and disenroll the case prior to re-enrolling in the new program office. Similarly, if a W-2 agency transfers a work program participant to another W-2 agency within its W-2 consortium, the FEP has to end all activities/components and disenroll the participant from the WP subsystem.

In addition, although Milwaukee W-2 agencies have the ability to transfer work program participants between their own regions without disenrolling cases, they are still required to close activities/components prior to the transfer. In order to decrease workload and better reflect services provided by W-2 agencies in the balance of state and Milwaukee, the Division has added new, more efficient WP office transfer functionality to CARES.

## NEW CARES FUNCTIONALITY

There are three changes to CARES functionality that have been made which simplify work program participant transfers between programs and within consortiums. The three changes are:

1. CARES no longer requires a FEP to end activities/components and disenroll a work program participant from the WP subsystem prior to transferring a participant from one W-2 agency to another W-2 agency within a W-2 consortium.
2. The new functionality no longer requires a FEP to end activities/components or disenroll a work program participant from the WP subsystem prior to transferring a case between the W-2 and FSET program offices within a single W-2 contract agency.
3. For Milwaukee, the new functionality will allow a W-2 agency in a consortium to transfer a work program participant between its own regions without ending all activities/components. (In these situations in Milwaukee, disenrollment is not currently necessary.)

The example below is a transfer between one Milwaukee W-2 WP office to another Milwaukee W-2 WP office within a consortium. The transfer information is entered on CARES screen WPWI where 1576 is inserted in the <NEW OFFICE> field on the third line of WPWI. The transfer is completed once the enter key is pressed.

WPWI		UPDATE WP CLIENT INFORMATION - 1		05/10/05 13:04	
				DWD852 J TONDRYK	
PIN: 00000000000					
SSN: xxxxxxxxxxxxx		WDA:	CTY/TRIBE: 40	OFFICE: 1575	NEW OFFICE: 1576
NAME: JANE		TEST			
ADDRESS: 00000		S WENTWORTH AVE			
CITY: MILWAUKEE		STATE: WI		ZIP: 532073066	MAILING ADDRESS ON WPWC: N
PRIMARY PHONE:		MESSAGE PHONE: _____			
PRIMARY WAGE EARNER: N		HEAD OF HOUSEHOLD: Y		DOB: 10 21 1974	
CASE: 2000498621		CAT: WW C SEQ: 01		2PAR: PL DESC: PARENT IN PLACEMENT	
ES OFFICE: 5040		REGION NUM: 05		E/SC: ABAWD: N	
ES WKR: XCTA27		IM REG CD: M		IM REG EFF: 02 24 2005	
CASE MGR: PWR993		*WP REG CD: M		*EFF DT: _____ SYST STS: R	
W2 PLACE: W2T		FEP ID: XCTA27		LF STATUS: _____ DT OF LAST CON: _____	
CF RFA:		CF RFA DT:		WA RFA: WA RFA DT:	
CF: FROM:		CTY:		CF COMP CD: _____ CF COMP EFF DT: _____	
WA: FROM:				WA COMP CD: _____ WA COMP EFF DT: _____	
PF13 WPED PF14 WPJR PF15 WPWC PF22 ACWI					
NEXT TRAN: _____		PARMS: 0000000000			

Once the enter key is pressed on WPWI, an "Office Transfer Out" and an "Office Transfer In" transaction appears on WPTN.

WPTN		SERVICES/TRANSACTION HISTORY				05/10/05 13:29	
PIN: 0000000000		OFFICE: _____				DWD852 J TONDRYK	
NAME: TEST		COUNTY/TRIBAL UNIT: _____					
		HISTORY OF SERVICES ONLY(Y/N): N					
OFFICE	PROV	STAFF	EFFECTIVE	ACTION	PHASE	NAME OF TRANSACTION	DATE ENTERED
NUMBER	ID	ID	DATE				INTO SYSTEM
1576	0000	DWD852	05 10 05			OFFICE TRANSFER IN	05 10 05
1575	0000	DWD852	05 10 05			OFFICE TRANSFER OUT	05 10 05
1575	0000	X CTA27	05 28 03			REFERRAL	05 28 03

### Highlights Of The New Functionality:

- Activities/components will transfer and remain open in the new WP office. CARES edits will not allow transfers of open activities/components if the activity is unique to W-2 or FSET (see [Edits To WPWI To Support New Transfer Process](#) below). An edit still exists that requires activities/components to be completed in the old office if the transfer will not occur within a consortium. Example, W-2 participant transfers to FSET program, participant was assigned to Domestic Violence Assessment and Supportive Services (AV) while in W-2. The AV activity must be closed prior to transfer to FSET office, since AV is not a valid FSET activity.
- Open activities/components must still be ended prior to transferring a work program participant outside of a W-2 consortium or single W-2 contract agency and edits are in place to prevent this.
- The new CARES transfer functionality does not require FEPs to keep all activities/components open. FEPs need to continue to end activities/components that are completed or will not continue in the new WP office.
- For transfer between W-2 to FSET offices, the W-2 paid placement must be ending and FSET must be mandatory (M) via AIWP. A pending referral must be on record at time of transfer, CARES does have these new edits to alert the FEP.
- Under the new transfer process, there are still "Informational Edits" in place that alert the worker to complete the Children First (CF) segment prior to transfer. This is only an informational edit so that workers complete the CF episode if the receiving office does not operate the CF program. If the CF worker wants the receiving office to continue providing CF services they do not have to complete the episode and it will remain open in the new office.

*Edits To WPWI To Support New Transfer Process*

The following are new CARES edits to WPWI to support the simplified transfer process. These new edits require specific actions by the FEP when transferring a work program participant. These actions have to be taken before the transfer can be completed.

1. CLOSE W2/CF COMPONENTS THAT ARE NOT VALID FOR FSET

When transferring a work program participant from the W-2 office to the FSET office within a W-2 contract agency (example Kenosha W-2 office to Kenosha FSET office), the FEP must close the W-2 activities/components that are valid only for the W-2 program. e.g. Domestic Violence Assessment and Supportive Services (AV)

**Action:** Close activities/components via WPCH which are not valid for FSET.

2. CLOSE FSET COMPONENTS THAT ARE NOT VALID FOR W2/CF.

When transferring a case from the FSET office to the W-2 office within a W-2 contract agency (example Dane County Capital Consortium FSET office to Dodge County Capital Consortium W-2 office) the FEP must close activities/components specific to FSET. e.g. Exemption Request (EX)

**Action** Close activities/components via WPCH before transfer to the W-2 office.

3. CF PROGRAM IS OPEN. (Informational only)

When transferring a work program participant from the FSET office to the W-2 office within a W-2 contract agency (example Dane County Capital Consortium W-2 office to Sauk County Capital Consortium FSET office), CARES checks to see if Children First is open.

**Action:** Complete the CF program on WPWI before attempting transfer if the receiving office does not wish to continue CF services, or if the receiving office does not operate a CF program.

4. CLOSE COMPONENTS BEFORE OFFICE TRANSFER.

The new work program participant transfer functionality cannot be done between different W-2 contract agencies within Milwaukee with open activities/components. (Example MAXIMUS to UMOs)

**Action:** Go to WPCH and complete all open activities/components before transfer.

5. OFFICE TRANSFER CAN'T BE DONE THE SAME DAY THAT A COMPONENT WAS POSTED.

When transferring a work program participant from the FSET office to the W-2 office (or vice versa) within a W-2 contract agency or within a consortium, activities/components with a begin date that is the same as the current date cannot be posted on the same day as the office transfer.

**Action:** Perform office transfer the next day. Also refrain from posting any new activities/components in the old WP office on the same day as an office transfer.

6. PLEASE DISENROLL. INTER CONTRACT AGENCY TRANSFER IS NOT ALLOWED.

Work program participants cannot be transferred to different contract agencies outside of Milwaukee County unless the activities/components are ended and the work program participant is disenrolled from work programs.

**Action:** End all activities/components via WPCCH and access WPDS to disenroll the work program participant.

7. NO PENDING REFERRAL. PROCESS REFERRAL THROUGH AIWP/AIJR.

When transferring a work program participant from the FSET office to the W-2 office (or vice versa) within a W-2 contract agency, there must be a pending referral.

**Action:** Process a new referral by AIJR or AIWP, then transfer.

8. OFFICE TRANSFER CAN'T BE DONE. PARTICIPANT IS EXEMPT IN THE PROGRAM.

When transferring a work program participant from the FSET office to the W-2 office (or vice versa) within a W-2 contract agency, participant must not be exempt in the new program.

**Action:** Check AIWP to verify or change status before transferring.

Additional WPWI Changes

Additional changes to CARES screen WPWI included the removal of the fields related to Welfare to Work (WTW). In addition, a new informational field indicating the assigned ES office has been added, and other fields have been logically regrouped.

The attached desk aide demonstrates CARES processing requirements in various agency configurations.

**CONTACTS**

BHCE CARES Information & Problem Resolution Center

Program Categories – FS – FoodShare, MA – Medicaid, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – Food Stamp Employment and Training, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WIA – Workforce Investment Act, Other EP – Other Employment Programs.

DWD/DWS/BW-2/JK